

# Alan Chapman

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## SUMMARY

Enterprise implementation consultant with eight years of client facing SaaS delivery across **home services** and **field operations**. Leads concurrent programs from discovery and scoping through requirements documentation, **configuration**, testing, training, launch, and **project close**. Translates dispatch, scheduling, membership, invoicing, and operational workflows into practical platform designs that support customer goals and product best practices. Coordinates data, product, training, and delivery partners while tracking dependencies, escalating risks, and removing roadblocks before timelines suffer. Creates clear documentation, acceptance criteria, role based resources, and executive updates that keep decisions visible. Uses Excel and Smartsheet for organized planning and delivery insight. Brings calm structure to complex customer work and can help implementation teams deliver reliable adoption and lasting client value.

## EXPERIENCE

### Senior Implementation Consultant

March 2022 - Present

HomeWorks Cloud Solutions

Nashville, TN

Leads enterprise home services SaaS implementations across discovery, workflow design, configuration, testing, training, launch, and close. Owns client communication, **risk management**, documentation, delivery coordination, and knowledge transfer for complex programs.

- Mapped **dispatch** workflows into platform configurations, giving customer teams clearer operating decisions.
- Built **discovery** plans and acceptance criteria, helping stakeholders approve scope before **configuration** began.
- Tracked dependencies in Smartsheet, surfacing **implementation risks** early and protecting committed **launch** dates.
- Created role based training resources, helping field and office users adopt new workflows confidently.
- Coordinated data, product, training, and delivery partners, keeping decisions visible across concurrent programs.
- Shared implementation practices with peers, improving consistency across customer documentation and project execution.

### Implementation Consultant

January 2019 - February 2022

FieldBridge Applications

Austin, TX

Managed multi client SaaS deployments for field operations, translating **business requirements** into configured workflows and coordinated delivery plans. Supported customer relationships, data coordination, training, testing, launch readiness, and post launch adoption.

- Led discovery sessions for **scheduling** and **invoicing** workflows, turning customer needs into actionable requirements.
- Configured SaaS workflows around operating practices, balancing client requests with repeatable platform standards.
- Used **Excel** trackers to organize testing evidence, open decisions, and launch readiness across accounts.
- Facilitated customer training sessions, giving dispatch and administrative teams practical guidance for daily use.
- Escalated delivery risks with solution options, helping project partners remove **roadblocks** before launch.
- Maintained implementation documentation, giving clients and internal teams a dependable reference after go live.

### Associate Implementation Consultant

June 2018 - December 2018

ServiceOps Technology Group

Dallas, TX

Supported supervised **home services** software onboarding through requirements gathering, configuration validation, testing preparation, training assistance, and customer documentation. Contributed to organized delivery while building practical expertise in **SaaS implementation** and field operations.

- Documented customer requirements during **discovery**, giving consultants a clearer foundation for **configuration** decisions.
- Validated scheduling configurations against agreed workflows, catching issues before customer testing sessions.
- Prepared training materials for office users, making new software steps easier to follow.
- Updated Excel implementation trackers, improving visibility into open tasks and customer decisions.
- Recorded testing feedback and dependencies, helping senior consultants coordinate timely resolution paths.
- Supported launch preparation through organized notes, status updates, and customer follow up.

## PROJECTS

### Home Services Workflow Standardization 📅 2024

Created a reusable approach for dispatch, scheduling, membership, and invoicing discovery. Clear templates helped teams compare customer needs with platform best practices, prepare acceptance criteria, and support smoother configuration conversations.

### Remote Implementation Readiness Program 📅 2022

Structured remote launch preparation across testing, training, documentation, and risk review. The program gave delivery partners a shared view of decisions, dependencies, customer resources, and launch ownership.

LEADERSHIP & AWARDS

- Recognized by delivery leadership for dependable ownership across concurrent enterprise implementation programs.
- Selected as a peer resource for practical SaaS configuration guidance and customer training preparation.
- Earned team trust through clear documentation, early risk visibility, and consistent follow through.

EDUCATION

Bachelor's Degree in Management Information Systems2018

University of North Texas GPA: 3.5Denton, TX

Coursework: SaaS implementation, project management, business analysis, information systems

CERTIFICATIONS

- Certified Associate in Project Management 📅 2020
- SaaS Implementation Foundations Certificate 📅 2024

TECHNICAL SKILLS

- **Implementation Delivery:** Discovery, Scoping, Configuration
- **Project Management:** Milestones, Dependencies, Launch Planning
- **Requirements Analysis:** Business Requirements, Acceptance Criteria, Workflow Mapping
- **Customer Training:** Role Based Training, Training Resources, Adoption Support
- **Risk Management:** Risk Identification, Risk Escalation, Roadblock Removal
- **Field Operations:** Dispatch, Scheduling, Membership
- **Financial Workflows:** Invoicing, Excel, Smartsheet
- **Quality Validation:** Testing, Configuration Validation, Launch Readiness
- **Documentation:** Requirements Documentation, Status Updates, Operating Practices
- **Stakeholder Coordination:** Data Teams, Product Teams, Delivery Leadership

SKILLS

- SaaS Implementation
  - Home Services
  - Client Management
  - Project Management
- Discovery
  - Scoping
  - Requirements Documentation
  - Software Configuration
- Testing
  - Client Training
  - Risk Management
  - Cross Functional Delivery
- Excel
  - Smartsheet
  - Change Adoption

PROFESSIONAL AFFILIATIONS

- Project Management Institute, member since 2020, connecting structured delivery practice with client outcomes.
- Association of Field Service Professionals, participant focused on home services operations and software adoption.

LANGUAGES

- English (Native)
- Spanish (Intermediate)

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST